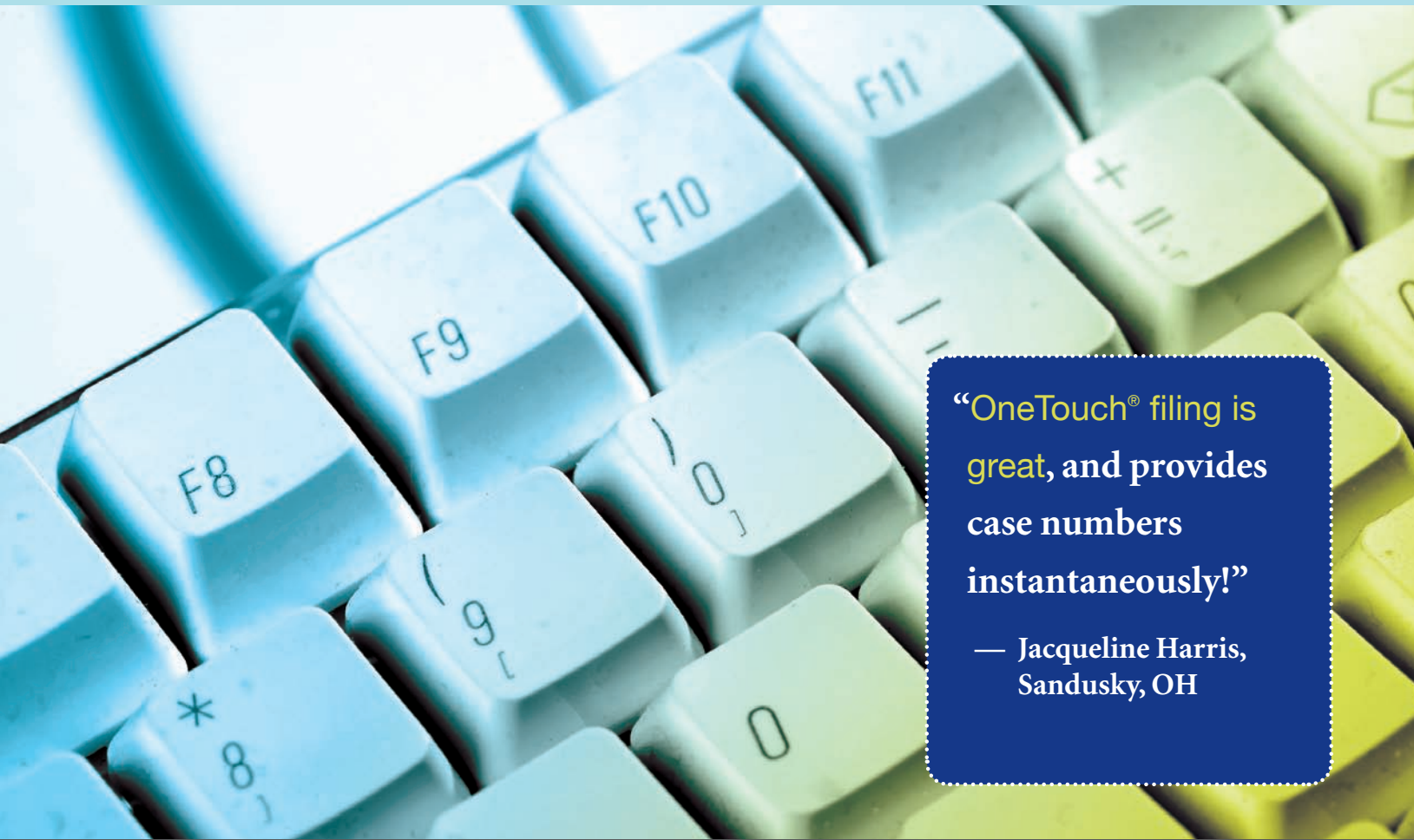
BEST CASE

ELECTRONIC CASE FILING

COMPREHENSIVE TUTORIAL FOR ELECTRONIC CASE FILING



"OneTouch® filing is great, and provides case numbers instantaneously!"

— Jacqueline Harris, Sandusky, OH

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About this Reference Guide

This step-by-step guide walks readers through an initial, an emergency and a post-petition filing. It includes helpful screenshots, tips, resources, and answers to frequently asked questions. Electronic filing is a breeze with Best Case® Bankruptcy.

Overview: The Era of E-filing

We are in the midst of the electronic era, where it's standard for bankruptcy filings to be submitted to the Courts over the internet. It's convenient, cost-effective and accessible at any time and helps the Courts reduce carrier and copying fees, paper use, and employee hours.

Today 93 Bankruptcy Courts have implemented Case Management/ Electronic Case Filing (CM/ECF) systems and thousands of cases are filed online daily.

In 2001, Best Case introduced OneTouch, the revolutionary electronic filing system. OneTouch set the standard for electronic filing and completely eliminated any manual navigation through the Court's web site, providing users with a streamlined filing process.

Since then, Best Case has continued to work closely with the Courts to enhance the electronic filing experience and equip users with time-saving tools and shortcuts to ensure that all cases are filed quickly and efficiently in the required Court's settings.

Easy-to-use tools such as the ECF Wizard, BestScan, and the ECF Manager help you prepare your pdf files, scan and convert paper files into PDF documents, and verify files for the proper naming convention and organizational structure guaranteeing the most accurate way to file.

OneTouch is the simplest, most reliable way to file electronically and is available in every Bankruptcy Court using CM/ECF. It is also compatible with all the CM/ECF systems being used by the Courts.

> "Once I click the button, I can rest assured that all has been done to serve my clients in the preparation and filing of their bankruptcy documents."
>
> – *Herman L. Jimerson, Jimerson Law Firm, PC, St. Louis, MO*

> "The most important feature to me is OneTouch filing! I work in a small office and I don't believe our office could file as many petitions as we do without Best Case!"
>
> – *Anne Matthews, Law Office of Michael P. Peavey, Wilson, NC*

Internet Resources

PACER
www.pacer.psc.uscourts.gov
Get a list of the Courts that have implemented or are implementing the CM/ECF system. Plus access links to CM/ECF local Court sites. Many of these sites include filing requirements, procedures, manuals, and other pertinent information.

US Courts
www.uscourts.gov/cmecf/cmecf.html
The CM/ECF site provides information about the CM/ECF system, user information and FAQs.

Best Case Solutions
www.bestcase.com/ecfresource.htm
Discover how to get up and running quickly, get details on features and functions and links to instructions for using the CM/ECF system.

CM/ECF Requirements:
- Internet access
- Web browser
- Login and password from your local court

Visit your local Court's web site for local filing requirements including forms, attachments and more.

Best Case ECF Training:

Best Case offers free web tutorials on the following electronic filing topics:

- **OneTouch Electronic Case Filing:** Discover how to generate PDF documents and use the OneTouch feature to submit forms to the Court's CM/ECF website
- **ECF Manager:** Get an understanding of the various features accessible through the ECF Manager window
- **Amended Filings:** Walk through a basic post-petition filing from PDF generation to CM/ECF Login

Go to **www.bestcase.com/webtutorials**

Electronic Case Filing Tutorial

Instructions for electronic filing are color coded for your convenience.	Initial Filing—Complete
	Initial Filing—Emergency
	Post-Petition Filing

Tip: Software shortcut or time-saving trick

COMPLETE THE REQUIRED CASE INFORMATION BEFORE STARTING THE ELECTRONIC FILING PROCESS.

Open the ECF Wizard by clicking the lightning bolt or using the keyboard shortcut [Ctrl]-[Q].

Initial Filing

Step 1: Select filing type — Complete Petition

To begin, select the Complete Petition option under Initial Filing.

Complete Petition: Best Case submits all required local court documents in the Forms and Schedules menu to the Court's web site. A case number is then assigned by the Court and recorded in the ECF Manager in Best Case.

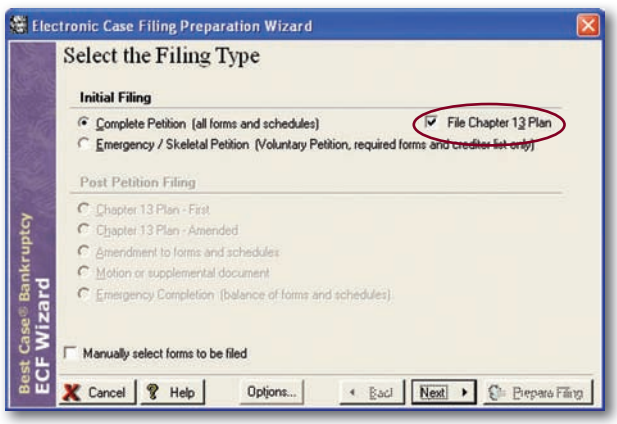
The Best Case OneTouch e-filing system automates the process. When you file a Complete Petition:

- All forms are submitted in the order specified by the local courts
- The pdf and matrix text files are properly titled
- Forms are excluded based on electronic filing requirements

If you are filing a Chapter 13 Plan:

- Check the box to file the Plan now, or uncheck to file the Plan at a later date.

CLICK NEXT TO GO TO STEP 2: PREPARE ECF FILING.


Electronic Case Filing Preparation Wizard
Select the Filing Type
Initial Filing
Complete Petition (all forms and schedules)
File Chapter 13 Plan
Emergency / Skeletal Petition (Voluntary Petition, required forms and creditor list only)
Post Petition Filing
Chapter 13 Plan - First
Chapter 13 Plan - Amended
Amendment to forms and schedules
Motion or supplemental document
Emergency Completion (balance of forms and schedules)
Manually select forms to be filed
Best Case® Bankruptcy ECF Wizard
Cancel Help Options... Back Next Prepare Filing

Select the Filing Type: Choose Complete Petition and check File Chapter 13 Plan if you are filing a Chapter 13 Plan.

Initial Filing

Step 2: Prepare Case for Filing — Complete Petition

The Ready to Prepare ECF Filing screen provides key information about the filing, including the name and chapter of the client, the type of filing, and the divisional office.

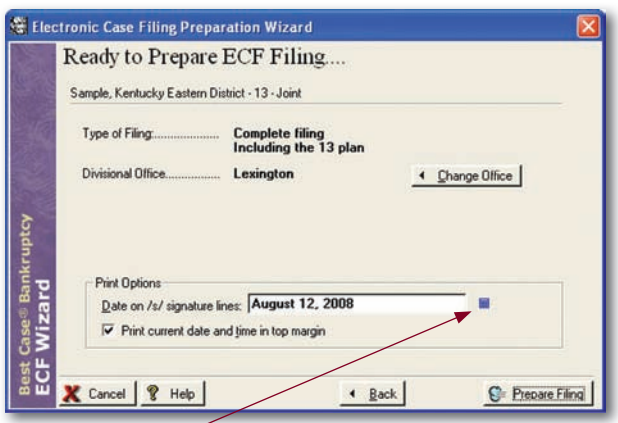
Prepare Case for Filing options:

- Change Office: Click to select a new court office location
- Specify a date for signature lines: It defaults to the current date but you can specify another date by using the calendar button

Make sure to review the type of filing, divisional office and date on signature lines before preparing the file for uploading.

Tip: Best Case automatically inserts "/s/ <name>" on signature lines, as well as the date, when electronic files are created.

CLICK PREPARE FILING TO GO TO STEP 3: UPLOAD DOCUMENTS


Electronic Case Filing Preparation Wizard
Ready to Prepare ECF Filing....
Sample, Kentucky Eastern District - 13 - Joint
Type of Filing: Complete filing Including the 13 plan
Divisional Office: Lexington
Change Office
Print Options
Date on /s/ signature lines: August 12, 2008
Print current date and time in top margin
Best Case® Bankruptcy ECF Wizard
Cancel Help Back Prepare Filing

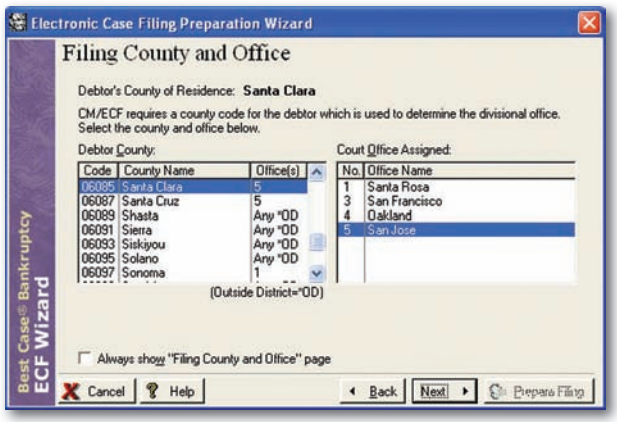
Ready to Prepare ECF Filing: Click the calendar button to the right of the Date on /s/ signature to choose a new date.

Filing County and Office

When processing an Initial filing with the ECF Wizard, the Filing County and Office screen may appear requesting county and office information. You will be asked to make a selection if the county code does not correspond with the list of county codes available in the district of filing or if there are two offices available for a county. Select the county and office from the tables provided.

Tip: *Office Number(s) in the right-hand column correspond with the numbers in the Court office table.*

NOTE: *If the office number is Any *OD, then any office can be chosen for filing. It is the attorney's responsibility to check with the Court to make sure the correct office is selected.*


Electronic Case Filing Preparation Wizard
Filing County and Office
Debtor's County of Residence: Santa Clara
CM/ECF requires a county code for the debtor which is used to determine the divisional office. Select the county and office below.
Debtor County:
Code | County Name | Office(s)
06085 Santa Clara 5
06087 Santa Cruz 5
06089 Shasta Any *OD
06091 Sierra Any *OD
06093 Siskiyou Any *OD
06095 Solano Any *OD
06097 Sonoma 1
(Outside District=*OD)
Court Office Assigned:
No. | Office Name
1 Santa Rosa
3 San Francisco
4 Oakland
5 San Jose
Always show "Filing County and Office" page
Cancel
Help
Back
Next
Prepare Filing
Best Case® Bankruptcy ECF Wizard

Filing County and Office: Select the county and office from the tables provided.

Initial Filing

Step 3: Upload Documents — Complete Petition

The ECF Manager opens when the ECF Wizard is completed. First verify that the files are correct, then upload them with OneTouch. (For more information on the ECF Manager see The ECF Manager: What You Need to Know, on page 10.)

Tip: *The ECF Manager is accessible at any time by clicking the ECF Manager button on the bottom of the Forms and Schedules menu.*

Verify the prepared files: Highlight and click the View button or double-click on each file to view. After verifying the accuracy of the files click OneTouch to file your case with the Court.

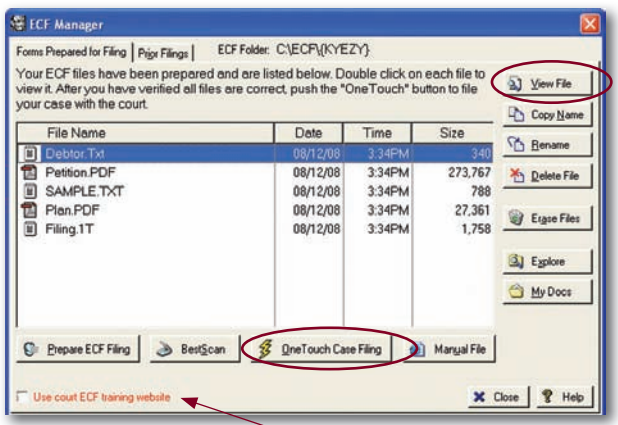
OneTouch: The OneTouch filing process automatically uploads all documents prepared for a Complete Petition filing.

Follow these instructions to file with OneTouch:

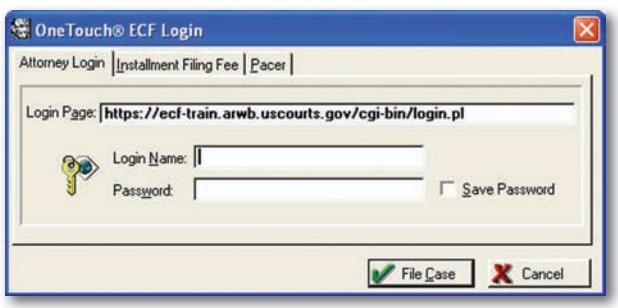
1. Click the OneTouch Case Filing button
2. When the ECF Login screen opens, enter your Court issued CM/ECF Login Name and Password
3. Click File Case
4. Then watch your files get uploaded to the Court's web site. Do not enter any information while the case is being uploaded unless prompted

Tip: *OneTouch is available in all live CM/ECF districts. If you don't see the OneTouch button and your district recently went live with CM/ECF, click Help/Check for Update to download the latest version, which may make OneTouch available.*

Note: *If you do not have a current Best Case Maintenance Plan select the Manual Filing button to file your case. Renew your Maintenance Plan today to get OneTouch capabilities. See page 7 for more information.*


ECF Manager
Forms Prepared for Filing
Prior Filings
ECF Folder: C:\ECF\(KYEZY)
Your ECF files have been prepared and are listed below. Double click on each file to view it. After you have verified all files are correct, push the "OneTouch" button to file your case with the court.
View File
Copy Name
Rename
Delete File
Erase Files
Explore
My Docs
File Name | Date | Time | Size
Debtor.Txt 08/12/08 3:34PM 340
Petition.PDF 08/12/08 3:34PM 273,767
SAMPLE.TXT 08/12/08 3:34PM 788
Plan.PDF 08/12/08 3:34PM 27,361
Filing.1T 08/12/08 3:34PM 1,758
Prepare ECF Filing
BestScan
OneTouch Case Filing
Manual File
Use court ECF training website
Close
Help

The ECF Manager: Gain access to the court's training site for practice cases or to complete ECF homework. There is a different password for the court's training site.

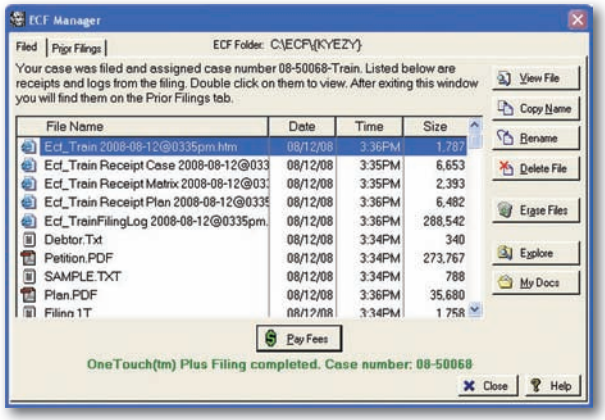


OneTouch ECF Login: Enter your court issued CM/ECF Login Name and Password.

After a OneTouch filing has been successfully completed, Best Case returns the court receipts and places them in the ECF Manager under the Filed tab.

Click the Pay Fees button to pay filing fees online.

Pay Now Express™ allows users to pay filing fees via the internet once the case number has been received. (For more information, see Pay Filing Fees Online, on page 9.)


ECF Manager
Filed
Prior Filings
ECF Folder: C:\ECF\(KYEZY)
Your case was filed and assigned case number 08-50068-Train. Listed below are receipts and logs from the filing. Double click on them to view. After exiting this window you will find them on the Prior Filings tab.
View File
Copy Name
Rename
Delete File
Erase Files
Explore
My Docs
File Name
Date
Time
Size
Ecf_Train 2008-08-12@0335pm.htm 08/12/08 3:36PM 1,787
Ecf_Train Receipt Case 2008-08-12@033 08/12/08 3:35PM 6,653
Ecf_Train Receipt Matrix 2008-08-12@03 08/12/08 3:35PM 2,393
Ecf_Train Receipt Plan 2008-08-12@0335 08/12/08 3:36PM 6,482
Ecf_TrainFilingLog 2008-08-12@0335pm. 08/12/08 3:36PM 288,542
Debtor.Txt 08/12/08 3:34PM 340
Petition.PDF 08/12/08 3:34PM 273,767
SAMPLE.TXT 08/12/08 3:34PM 788
Plan.PDF 08/12/08 3:36PM 35,680
Filing.1T 08/12/08 3:34PM 1,758
Pay Fees
OneTouch(tm) Plus Filing completed. Case number: 08-50068
Close
Help

ECF Manager: All receipts along with the assigned case number are placed in the Filed Tab for reference.

Initial Filing

Step 1: Select Filing Type — Emergency Petition

Emergency/Skeletal Petition: An Emergency Petition requires the user to select the majority of the forms manually.

To file an Emergency Petition, select the Emergency/Skeletal Petition option under Initial Filing.

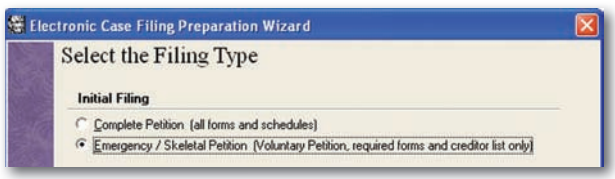
Click Next to access the Forms to File screen.

Check all additional forms to be included in the filing. A few required forms are pre-selected, and they may include:

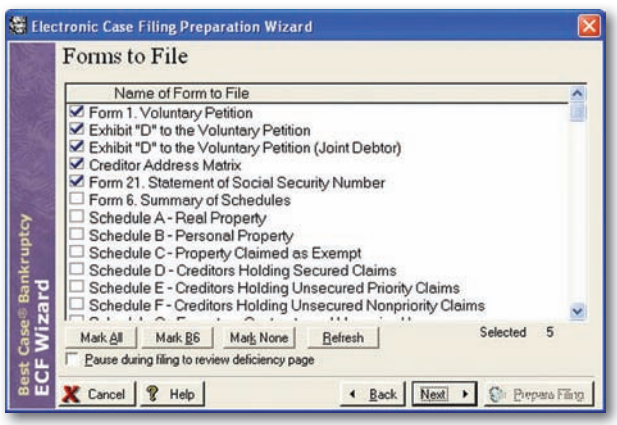
- Voluntary Petition
- Creditor Address Matrix
- Form 21 Statement of Social Security Number
- Form 4. List of Creditors Holding 20 Largest Unsecured Claims (for a Chapter 11 case)

Click Refresh to move the checked forms to the top of the list.

CLICK NEXT TO GO TO STEP 2: PREPARE CASE FOR FILING.


Electronic Case Filing Preparation Wizard
Select the Filing Type
Initial Filing
Complete Petition (all forms and schedules)
Emergency / Skeletal Petition (Voluntary Petition, required forms and creditor list only)

Select Filing Type: Choose Emergency Petition.


Electronic Case Filing Preparation Wizard
Forms to File
Best Case® Bankruptcy ECF Wizard
Name of Form to File
Form 1. Voluntary Petition
Exhibit "D" to the Voluntary Petition
Exhibit "D" to the Voluntary Petition (Joint Debtor)
Creditor Address Matrix
Form 21. Statement of Social Security Number
Form 6. Summary of Schedules
Schedule A - Real Property
Schedule B - Personal Property
Schedule C - Property Claimed as Exempt
Schedule D - Creditors Holding Secured Claims
Schedule E - Creditors Holding Unsecured Priority Claims
Schedule F - Creditors Holding Unsecured Nonpriority Claims
Mark All
Mark 86
Mark None
Refresh
Selected 5
Pause during filing to review deficiency page
Cancel
Help
Back
Next
Prepare Filing

Forms to File: Select the forms to be included in the filing.

Initial Filing

Step 2: Prepare Case for Filing — Emergency Petition

The Ready to Prepare ECF Filing screen provides key information about the filing, including the name and chapter of the client, the type of filing, and the divisional office.

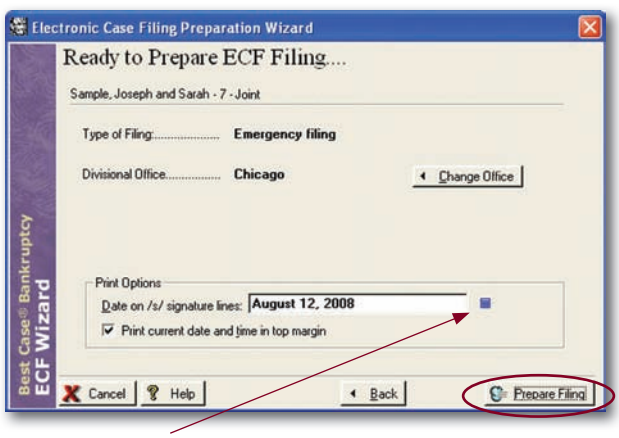
Prepare Case for Filing options:

- Change Office: Click to select a new court office location
- Specify a date for signature lines: It defaults to the current date but you can specify another date by using the calendar button

Make sure to review the type of filing, divisional office and date on signature lines before preparing the file for uploading.

Tip: *Best Case automatically inserts "/s/ <name>" on signature lines, as well as the date, when electronic files are created.*

CLICK PREPARE FILING TO GO TO STEP 3: UPLOAD DOCUMENTS


Electronic Case Filing Preparation Wizard
Ready to Prepare ECF Filing....
Best Case® Bankruptcy ECF Wizard
Sample, Joseph and Sarah - 7 - Joint
Type of Filing: Emergency filing
Divisional Office: Chicago
Change Office
Print Options
Date on /s/ signature lines: August 12, 2008
Print current date and time in top margin
Cancel
Help
Back
Prepare Filing

Ready to Prepare ECF Filing: Click the calendar button to the right of the Date on /s/ signature to choose a new date.

Step 3: Upload Documents — Emergency Petition

The ECF Manager opens when the ECF Wizard is completed. First verify that the files are correct then upload them with OneTouch. (For more information on the ECF Manager see *T*he ECF Manager: What You Need to Know, on page 10.)

Tip: *The ECF Manager is accessible at any time by clicking the ECF Manager button on the bottom of the Forms and Schedules menu.*

Verify the prepared files: Highlight and click the View button or double-click on each file to view. After verifying the accuracy of the files click OneTouch to file your case with the court.

OneTouch: The OneTouch filing process automatically uploads all documents prepared for an Emergency Petition filing.

Follow these instructions to file with OneTouch:

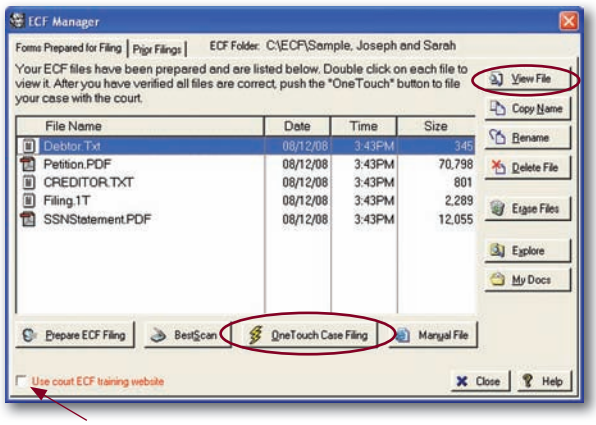
1. Click the OneTouch Case Filing button.
2. When the ECF Login screen opens, enter your court issued CM/ECF Login Name and Password.
3. Click File Case.
4. Then watch your files get uploaded to the court's web site. Do not enter any information while the case is being uploaded unless prompted.

Tip: *OneTouch is available in all live CM/ECF districts. If you don't see the OneTouch button and your district recently went live with ECF, click Help/Check for Update to download the latest version, which may make OneTouch available.*

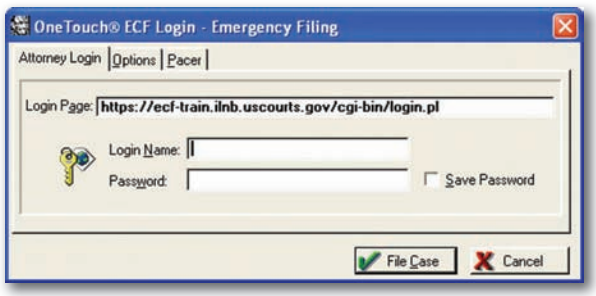
Note: *If you do not have a current Best Case Maintenance Plan select the Manual Filing button to file your case. Renew your Maintenance Plan today to get OneTouch capabilities. See page 7 for more information.*

After a successful OneTouch filing has been completed, Best Case returns the court receipts and places them in the ECF Manager.

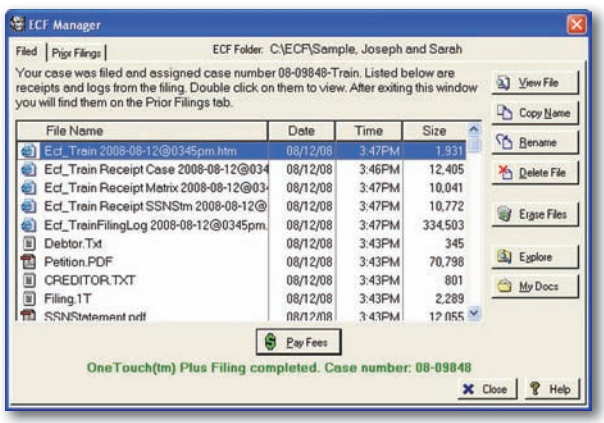
Tip: *OneTouch is available in all live CM/ECF districts. If you don't see the OneTouch button and your district recently went live with ECF, click Help/Check for Update to download the latest version, which may make OneTouch available.*



The ECF Manager: Gain access to the court's training site for practice cases or to complete ECF homework. There is a different password for the court's training site.



OneTouch ECF Login: Enter your court issued CM/ECF Login Name and Password.


ECF Manager
Filed
Prior Filings
ECF Folder: C:\ECF\Sample, Joseph and Sarah
Your case was filed and assigned case number 08-09848-Train. Listed below are receipts and logs from the filing. Double click on them to view. After exiting this window you will find them on the Prior Filings tab.
View File
Copy Name
Rename
Delete File
Erase Files
Explore
My Docs
File Name
Date
Time
Size
Ecf_Train 2008-08-12@0345pm.htm 08/12/08 3:47PM 1,931
Ecf_Train Receipt Case 2008-08-12@034 08/12/08 3:46PM 12,405
Ecf_Train Receipt Matrix 2008-08-12@03 08/12/08 3:47PM 10,041
Ecf_Train Receipt SSNStm 2008-08-12@ 08/12/08 3:47PM 10,772
Ecf_TrainFilingLog 2008-08-12@0345pm. 08/12/08 3:47PM 334,503
Debtor.Txt 08/12/08 3:43PM 345
Petition.PDF 08/12/08 3:43PM 70,798
CREDITOR.TXT 08/12/08 3:43PM 801
Filing.1T 08/12/08 3:43PM 2,289
Pay Fees
OneTouch(tm) Plus Filing completed. Case number: 08-09848
Close
Help

ECF Manager: All receipts along with the assigned case number are placed in the Filed Tab for reference.

Post-Petition

Step 1: Select Filing Type — Post-Petition

Post-Petition Filing: If a case number has been assigned and entered in the Voluntary Petition, then the Post-Petition filing options are available.

1. Open the ECF Manager and Click Prepare ECF Filing.

2. Select from the following options:
   - Chapter 13 Plan – First
   - Chapter 13 Plan – Amended
   - Amendment to forms and schedules
   - Motion or supplemental document
   - Emergency Completion

3. Click Next to proceed to the Forms to File screen. Review the documents and select any additional documents to include in the Post-Petition filing.

If you are filing a:
- Chapter 13 Plan – First
- Motion or supplemental document
- Emergency Completion

CLICK NEXT TO GO TO STEP 2: PREPARE CASE FOR FILING.

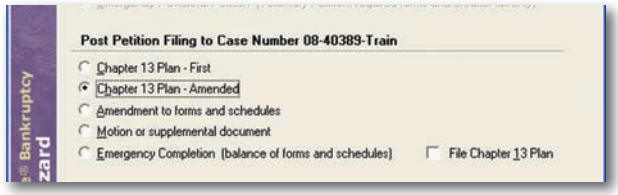
If you are filing a:
- Chapter 13 Plan – Amended
- Amendment to Forms and Schedules

CLICK NEXT TO GO TO THE AMENDED FILING SCREEN.

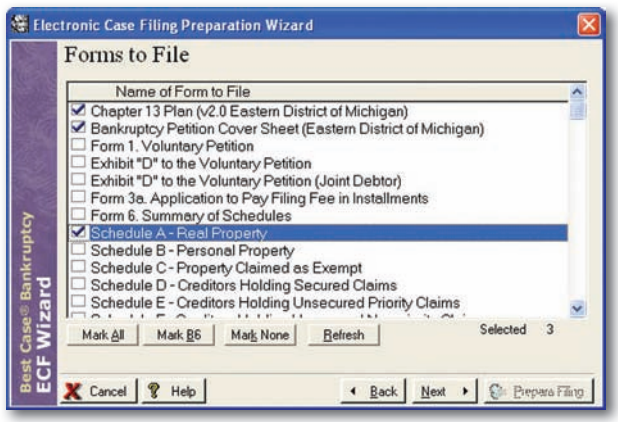
4. **Amended Filing Screen.** If you are filing an amended Chapter 13 Plan or an Amendment to Forms and Schedules, then the Amended Filing screen prompts you to select options for filing.

Options include:
- Print "Amended" in Form Title: The default is Amended, you may change the text by deleting Amended and typing in a new title.
- Print Only Items Marked Amended (on Sch A-H and Matrix): Check this to print only creditors and properties where the Amended check box is checked on entry screens.
  - Items Marked Amended: Provides a summary of the amended items and tallies the quantity.
- Create Creditor Mailing List File (Matrix): Check this option to create an updated text file of the matrix.

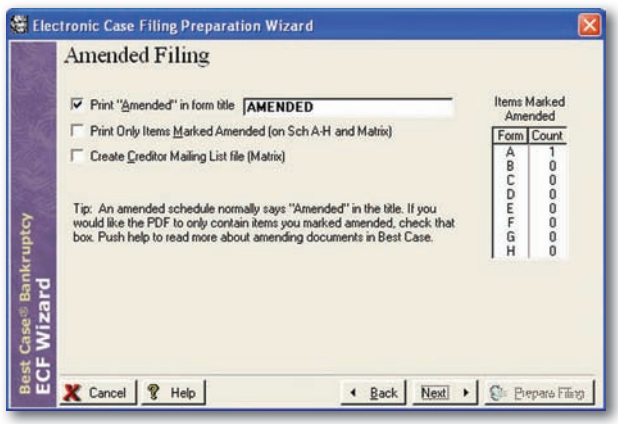
CLICK NEXT TO GO TO STEP 2: PREPARE CASE FOR FILING.


Post Petition Filing to Case Number 08-40389-Train
Chapter 13 Plan - First
Chapter 13 Plan - Amended
Amendment to forms and schedules
Motion or supplemental document
Emergency Completion (balance of forms and schedules)
File Chapter 13 Plan

Post-Petition Filing: Select the type of post-petition filing.


Electronic Case Filing Preparation Wizard
Forms to File
Name of Form to File
Chapter 13 Plan (v2.0 Eastern District of Michigan)
Bankruptcy Petition Cover Sheet (Eastern District of Michigan)
Form 1. Voluntary Petition
Exhibit "D" to the Voluntary Petition
Exhibit "D" to the Voluntary Petition (Joint Debtor)
Form 3a. Application to Pay Filing Fee in Installments
Form 6. Summary of Schedules
Schedule A - Real Property
Schedule B - Personal Property
Schedule C - Property Claimed as Exempt
Schedule D - Creditors Holding Secured Claims
Schedule E - Creditors Holding Unsecured Priority Claims
Mark All
Mark B6
Mark None
Refresh
Selected 3
Cancel
Help
Back
Next
Prepare Filing
Best Case® Bankruptcy ECF Wizard

Forms to File: Check the forms you wish to file.


Electronic Case Filing Preparation Wizard
Amended Filing
Print "Amended" in form title
AMENDED
Print Only Items Marked Amended (on Sch A-H and Matrix)
Create Creditor Mailing List file (Matrix)
Items Marked Amended
Form
Count
Tip: An amended schedule normally says "Amended" in the title. If you would like the PDF to only contain items you marked amended, check that box. Push help to read more about amending documents in Best Case.
Cancel
Help
Back
Next
Prepare Filing
Best Case® Bankruptcy ECF Wizard

Amended Filing: If you are filing an amendment choose from these options.

Benefits of Maintenance

OneTouch is a web-based service and requires Maintenance coverage per the licensing agreement.

The Best Case Maintenance Plan provides:
- Access to OneTouch Filing and Credit Report Import
- Free Software Updates: File with the most current forms and schedules
- Expert toll-free technical support
- A listing for your firm on www.bestcase.com/bkattysg.htm
- A subscription to *Best Case Scenarios* and *Best Case Spotlight*

Don't let your Maintenance Plan lapse! Call 1.800.492.8037 to renew today.

Post-Petition

Step 2: Prepare Case for Filing — Post-Petition

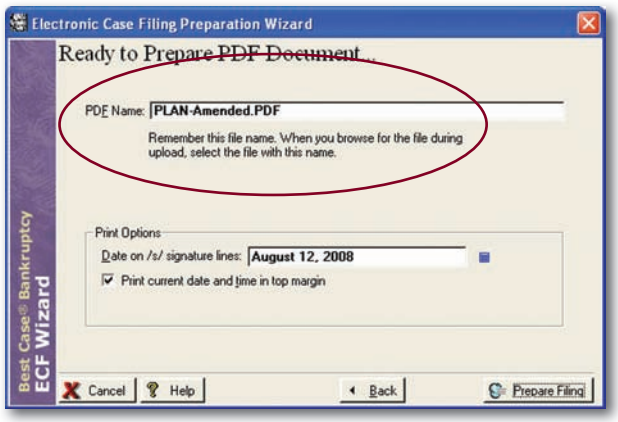
The Ready to Prepare ECF Filing screen provides key information about the filing, displays the PDF filing name and the date on /s/ signature lines.

Prepare Case for Filing options:

- Remember the file name assigned. When browsing for the file during upload, select the file with this name.
- Specify a date for signature lines. It defaults to the current date but you can specify another date.

Click the Prepare Filing button. The files are created for uploading to the court's web site and placed in the ECF Manager.

CLICK NEXT TO GO TO STEP 3: UPLOAD DOCUMENTS


Electronic Case Filing Preparation Wizard
Ready to Prepare PDF Document
PDF Name: PLAN-Amended.PDF
Remember this file name. When you browse for the file during upload, select the file with this name.
Print Options
Date on /s/ signature lines: August 12, 2008
Print current date and time in top margin
Best Case® Bankruptcy ECF Wizard
Cancel
Help
Back
Prepare Filing

Ready to Prepare PDF Document: Document the file name then click Prepare Filing to create electronic files.

Post-Petition

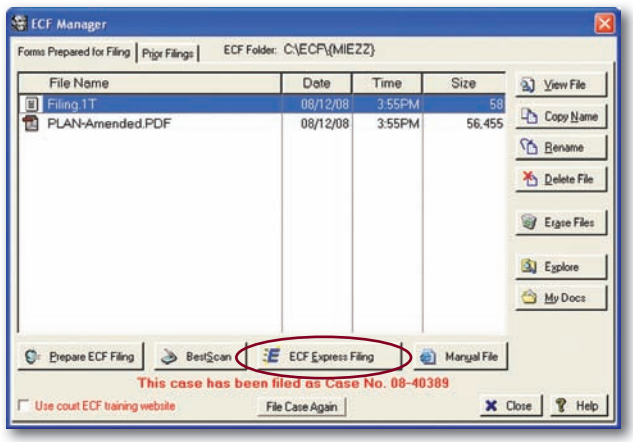
Step 3: Upload Documents — Post-Petition

The ECF Manager opens when the ECF Wizard is completed. First verify that the files are correct then upload them with ECF Express. (For more information on the ECF Manager see The ECF Manager: What You Need to Know on page 10.)

Tip: *The ECF Manager is accessible at any time by clicking the ECF Manager button on the bottom of the Forms and Schedules menu.*

Verify the prepared files: Highlight and click the View button or double-click on each file to view. After verifying the accuracy of the files click ECF Express Filing to file your case with the Court.

ECF Express™: This manual filing process is used for post-petition documents. ECF Express simplifies uploading amendments, adding creditors and submitting supplemental documents by automating certain portions of the process on the Court's web site.



Forms Prepared for Filing: View files then click ECF Express to upload post-petition documents to the Court's web site.

ECF Express:
Unlike OneTouch, you make the decisions about which actions to perform.

Follow these instructions to file with ECF Express:

1. Click the ECF Express Filing button
2. When the ECF Login screen opens, enter your Court issued CM/ECF Login Name and Password
3. The Bankruptcy Events page opens in the ECF Express window. Select the desired event

Steps 4-9 are a sampling of what you might expect.
Note each Court's web site is different.

4. Select file type and click Next
5. Select the party. (ECF Express automatically selects the Debtor and Joint Debtor if applicable.) Click Next/Submit to continue.
6. Click Browse to locate the file
7. The client file automatically opens. Select the document to file and click Open
8. Click Next to continue
9. Verify and confirm the docket text. A receipt is provided. Print a copy for your records or save as an electronic version

Click the Bankruptcy link in the top toolbar to continue filing additional post-petition documents in the same session.

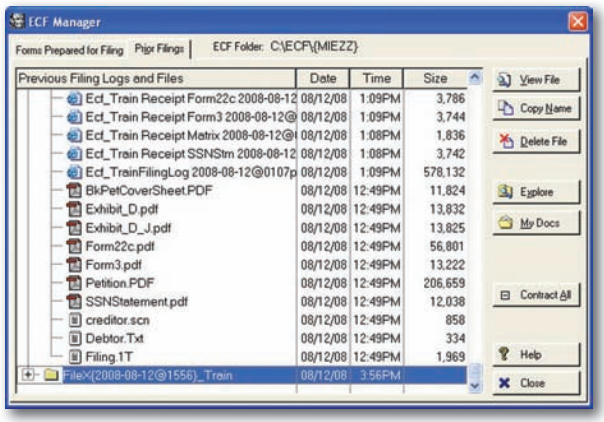
Prior Filings tab:

Upon completion of the filing, an ECF Express Log—which contains previously accessed screens during the initial filing—is saved in the Prior Filings tab in the ECF Manager.

The Prior Filings tab is available through the ECF Manager, and provides the following options:

- View File
- Copy Name
- Delete File
- Explore
- My Docs

(For complete details see The ECF Manager: What You Need to Know on page 10.)



Prior Filings: Lists all documents previously uploaded along with receipts.

Pay Filing Fees Online

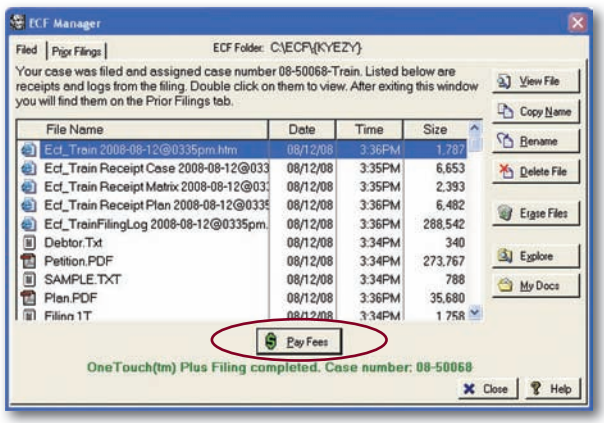
In the ECF Manager you can Pay your filing fees with Pay Now Express.

Follow these simple instructions to pay your fees online:

1. Click the Pay Fees button
2. Click the Login Now button and it will:
   - Automatically connect to the Court's web site
   - Log into your CM/ECF account
   - Open the Utilities or Reports menu
   - Select Internet Payments Due for your account

IMPORTANT: While Pay Now Express is logging into the Court's web site, do not click anything.

3. When the U.S. Courts' Payment Collections web site appears click Pay Now to begin the payment.

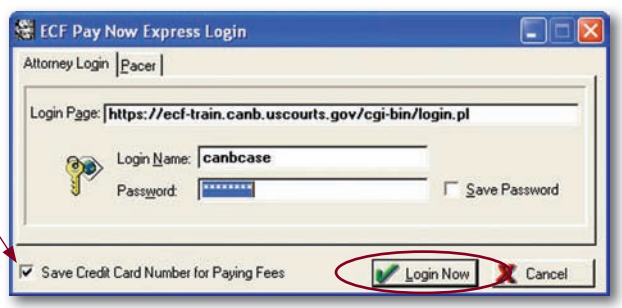


Pay Fees: Click the Pay Fees button to access the Login screen.

Tip: Check the Save Credit Card Number for Paying Fees, so in the future you don't have to key in the credit card information, it is entered automatically. (Note, this feature is only available in CM/ECF districts where the court offers Internet credit card payments.)

To pay fees later follow these steps:

1. Open a client file that has previously been filed electronically
2. Open the ECF Manager
3. Click the ECF Express button in the ECF Manager screen
4. Enter your CM/ECF Login Name and Password and click the Login Now button. ECF Express automatically connects you to the Court's web site and logs you into your CM/ECF account
5. On the main CM/ECF menu screen, click the green dollar sign ($) in the top toolbar
6. Click the Pay Now button on the following screen to submit your credit card payment for all outstanding CM/ECF fees



ECF Pay Now Login: Enter your CM/ECF Login and Password.

Assign a Judge and Trustee

Follow these simple instructions:

1. Return to the ECF Manager
2. Click the ECF Express button
3. Enter your login name and password
4. When you are at the Bankruptcy Events menu, click the J/T button in the toolbar to assign the Judge and Trustee
5. A receipt will be received once assigned
6. Print out the receipt for your records

The ECF Manager: What You Need to Know

The ECF Manager opens once the files have been prepared using the ECF Wizard. Here you can access, edit, and upload electronic files. To launch the ECF Manager at any time, click the ECF Manager button located at the bottom of the Forms and Schedules menu.

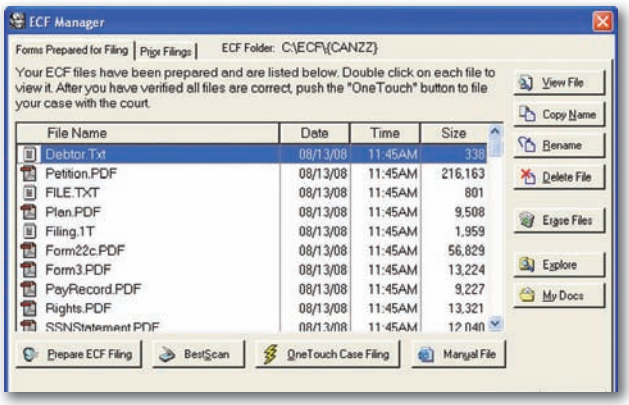
Tab 1 Forms Prepared for Filing Tab

The ECF Manager hosts a variety of user-friendly features including:

- **View File:** Highlight the file and click the View button or double-click on the file
- **Copy Name:** Highlight the file and click the Copy Name button. Then go to the court's web site and paste it [Ctrl]-[V] into the appropriate slot
- **Rename:** Highlight the file and click the Rename button, a window opens which prompts you to rename the file
- **Delete File:** Move all files to the Recycle Bin

NEW

Note: *Once files have been deleted from the Windows Recycle Bin, they are permanently removed.*



The ECF Manager: The OneTouch option is available for first time filings.

- **Erase File:** Erases the ECF files listed
- **Explore:** Open Windows Explorer in the file folder
- **My Docs:** Locate a document saved in the My Documents folder
- **BestScan:** To scan and attach documents for filing

(For more information see BestScan: Scan and Attach Documents on page 11)

Right-click to access additional functionality:

- **View File:** View the file before submitting it to the court
- **Print File:** Print the file for your records
- **Copy Name to Clipboard:** Copy the file name and path to the clipboard so it can be pasted into the Court's web site without having to browse for the file
- **Rename File:** Rename the electronic file
- **Delete files:** Delete a file

Upload File Options:

OneTouch: The OneTouch electronic filing system uploads initial petitions to the Court's web site with a simple click, and quickly provides filing receipts. Customized to meet your Court's local requirements for forms, OneTouch automatically submits the specific forms with the petition.

ECF Express: Specifically designed for uploading post-petition filings, ECF Express simplifies the amendments process by automating certain portions of the process on the Court's web site. However, ECF Express is a manual filing process.

Manual Filing: This option allows you to upload electronic files manually to the Court's web site. Choose the Manual Filing option to open the Court's web site and follow the instructions provided by the local court to open a case and upload files.

IMPORTANT: A current Best Case Maintenance Plan is required to run OneTouch and ECF Express. Call today, 1.800.492.8037.

> "I love the OneTouch filing system. It files everything for you—from the petition to all the schedules."
>
> – *Brandi Norris, Legal Assistant, Glast , Phillips & Murray, Dallas, TX*

Tab 2 Prior Filings Tab

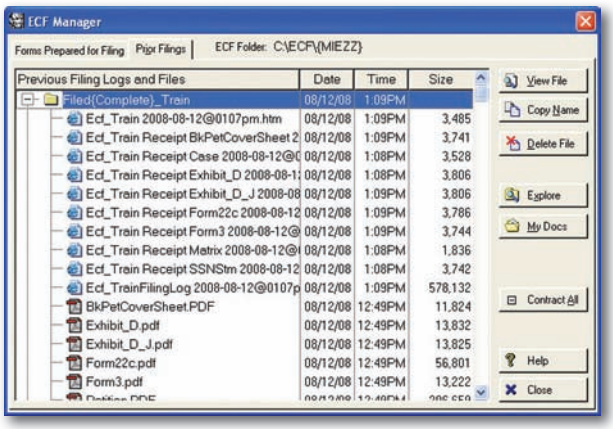
The Prior Filings tab stores all files that have been submitted to the Court along with the receipts.

The Prior Filings tab also displays a list of the folder(s) created for each connection to the Court's web site, along with the date and time each folder was created.

To see the contents of a folder, click the [+] located to the left of the folder. Once expanded it will display a [-].

The folders expand to reveal a list of the individual files stored in each folder. You can access a variety of files including:

- An ECF receipt for each document filed
- An ECF Log which provides a complete record of all screens accessed and information entered during the filing process
- Copies of any PDF documents or text files uploaded during the filing process



Prior Filings: Lists all documents previously uploaded along with receipts.

You can use the same features available in Forms Prepared for Filing tab: View File, Copy Name, Rename, Delete File, Erase File, Explore and My Docs, and BestScan.

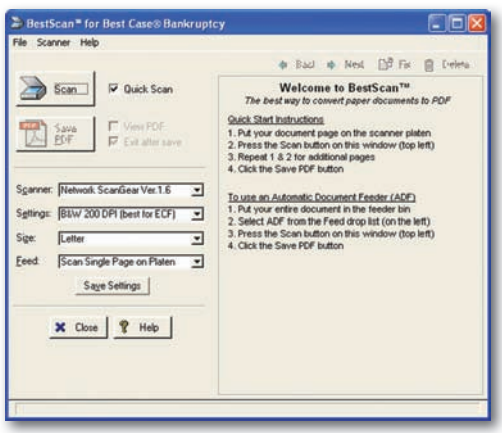
BestScan: Scan and Attach Documents

BestScan converts scanned documents to the Court's preferred settings, and then creates a PDF document for easy uploading to the Court's web site. BestScan is an ideal tool to use for supplemental documents, such as pay stubs, certificates of credit counseling, and signed declarations of electronic filing.

How to Use BestScan:

1. Open the ECF Manager
2. Click BestScan
3. Load the document into the scanner and click Scan (repeat for additional pages if using a flatbed scanner)
4. When completed, click Cancel to stop scanning
5. Click Save PDF
6. Name the file, and click Save. The name of the electronic file is displayed in the ECF Manager

Tip: *To ensure that OneTouch is able to file the scanned documents, certain naming conventions must be used. See BestScan Standardized Naming Conventions on page 12. For additional naming conventions see the Help File.*


BestScan™ for Best Case® Bankruptcy
File
Scanner
Help
Scan
Quick Scan
Save PDF
Welcome to BestScan™
The best way to convert paper documents to PDF
Quick Start Instructions
1. Put your document page on the scanner platen
2. Press the Scan button on this window (top left)
3. Repeat 1 & 2 for additional pages
4. Click the Save PDF button
To use an Automatic Document Feeder (ADF)
1. Put your entire document in the feeder bin
2. Select ADF from the Feed drop list (on the left)
3. Press the Scan button on this window (top left)
4. Click the Save PDF button
Scanner:
Settings:
Size:
Feed:
Save Settings
Close
Help

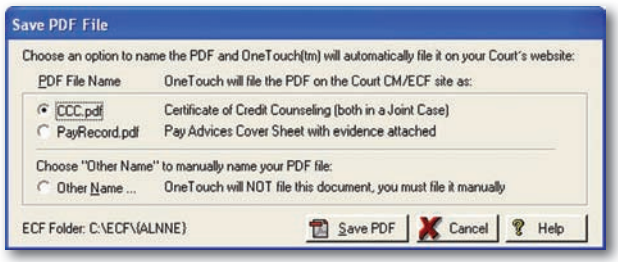
BestScan: The default settings include flatbed scanner, letter-size paper, and the court-recommended resolution of 200 dpi.

IMPORTANT: Scanners must have a Twain driver for BestScan to work.

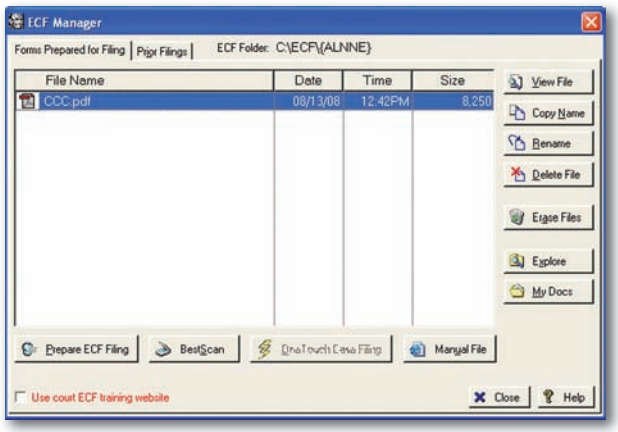
Standardized Naming Conventions:

1. A Save PDF File screen opens and lists all the supplemental documents that can be filed with OneTouch. Depending on the jurisdiction, choose from:
   - CCC.pdf for Certificate of Credit Counseling
   - CCC1.pdf for Certificate of Credit Counseling
   - CCC2.pdf for Certificate of Credit Counseling
   - PayStubs.pdf
   - PayStubs1.pdf
   - PayStubs2.pdf
   - SignDec.pdf
   - DecRe.pdf
   - SSNStatement.pdf
   - Intent.pdf
2. A PDF file is generated, correctly named and saved to the ECF Manager.

Note: *If you are filing in a district where there are no supplemental documents uploaded during OneTouch, or you have previously filed the case, you will be taken to a Save As screen. Here manually name the PDF file and click Save. The name of the electronic file created is displayed in the ECF Manager. If you are taken to this window, OneTouch will not upload the scanned document.*


Save PDF File
Choose an option to name the PDF and OneTouch(tm) will automatically file it on your Court's website:
PDF File Name
OneTouch will file the PDF on the Court CM/ECF site as:
CCC.pdf
Certificate of Credit Counseling (both in a Joint Case)
PayRecord.pdf
Pay Advices Cover Sheet with evidence attached
Choose "Other Name" to manually name your PDF file:
Other Name ...
OneTouch will NOT file this document, you must file it manually
ECF Folder: C:\ECF\(ALNNE)
Save PDF
Cancel
Help

Save PDF: Best Case will prompt you to save the documents in the proper format for electronic filing.



ECF Manager: The file is saved in the ECF Manager for viewing.

Scanned Attachments:

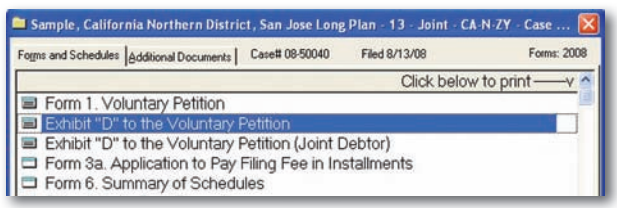
The Scanned Attachment feature makes it easy to scan documents and attach them directly to a form or schedule without any additional steps.

Create an electronic copy of any paper document and attach it to the debtor's petition or to a particular form including:

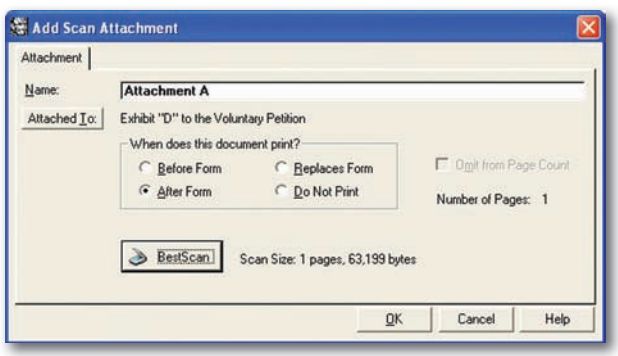
- Legal property descriptions such as a deed to a house or the title for a car
- The debtor's certificate of completion of the post-petition financial management course

Insert a Scanned Attachment:

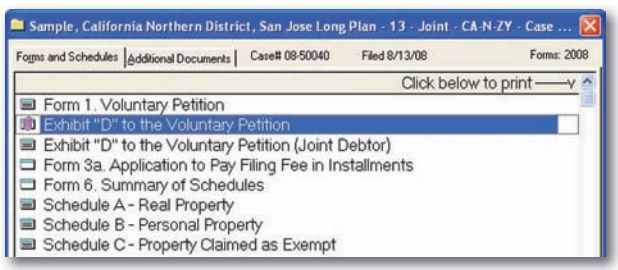
1. From the Forms and Schedules menu, highlight the document, click the Attach button or use the keyboard shortcut [Alt]-[t].
2. The Add a Scanned Document screen opens, click Insert to select the document then click Scan Attachment.
3. The scanner is identified and opens the Scan to Attachment screen.
4. Load the document into the scanner and click Scan.
5. Review the scanned document and click Save.
6. Add Scan Attachment Screen:
   - Name: To change the name of the attachment, simply delete the existing name and type the new one. The default name is based on the number of attachments.
   - Attached to Form: To change the form that the scan is attached to, click the Attached To button and select the appropriate form from the drop-down list that appears.
   - When does this document print? To print the attachment before the form, replace the original form with the attachment or omit the attachment when printing, click the corresponding radio button option.


Sample, California Northern District, San Jose Long Plan - 13 - Joint - CA-N-ZY - Case ...
Forms and Schedules
Additional Documents
Case# 08-50040
Filed 8/13/08
Forms: 2008
Click below to print
Form 1. Voluntary Petition
Exhibit "D" to the Voluntary Petition
Exhibit "D" to the Voluntary Petition (Joint Debtor)
Form 3a. Application to Pay Filing Fee in Installments
Form 6. Summary of Schedules

Attach a Document: Hightlight the document and click attach.



Add Scan Attachment: Change the name of the document, the form it's attached to and the print order.


Sample, California Northern District, San Jose Long Plan - 13 - Joint - CA-N-ZY - Case ...
Forms and Schedules
Additional Documents
Case# 08-50040
Filed 8/13/08
Forms: 2008
Click below to print
Form 1. Voluntary Petition
Exhibit "D" to the Voluntary Petition
Exhibit "D" to the Voluntary Petition (Joint Debtor)
Form 3a. Application to Pay Filing Fee in Installments
Form 6. Summary of Schedules
Schedule A - Real Property
Schedule B - Personal Property
Schedule C - Property Claimed as Exempt

Identify Attachment: A paper clip will be displayed to signify your attachment was successful.

7. Click OK to save the attachment and return to the attachments list screen. The scanned document is now permanently part of the client's file. Anytime you print the original form or convert it to PDF format, the scanned document will be included as part of the form.
8. Click Close to return to the Forms and Schedules menu, or click Insert to add another attachment.

Replacing a Form with a Scanned Attachment:
For some clients, the attachment feature can be used to replace the standard version of a form with a scanned document.
To create an attachment that replaces a form:
1. Create an attachment using steps 1-3 outlined in Insert a Scanned Attachment.
2. At step 4, choose "Replaces Form" in the Attachment Options dialog box.
3. In the Forms and Schedules menu, the word "Replaced" appears in brackets in front of the form name, indicating the form has been replaced.

To open the Attachments screen double-click on the file in the Forms and Schedules menu.

IMPORTANT: A warning is posted at the top of the screen that states, "The normally generated document has been replaced by an attachment". This is a reminder that making any changes in the entry screen will not be reflected in the attachment, because the attachment has already been saved.

PDF Files: Attachments

Attachments — Adding and Replacing Files

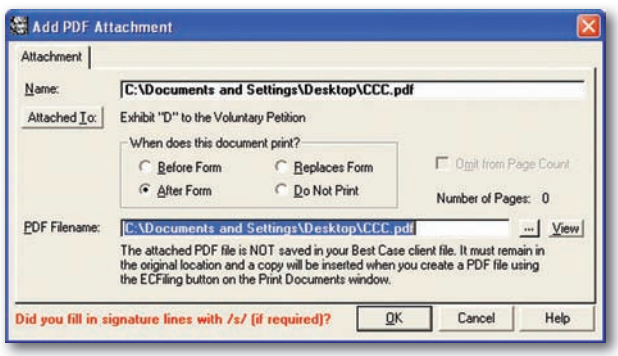
There are times when a scanned document, such as a pay stub or a credit counseling certificate, needs to be included in the filing. The PDF attachment feature allows users to insert a previously created PDF file into Petition.pdf or attach a PDF to another document making it easier to file.

IMPORTANT: PDF attachments are for Electronic Filing ONLY.

Insert a PDF Attachment:
1. From the Forms and Schedules menu highlight the document, and click the Attach button at the bottom of the window.
   Keyboard shortcut: [Alt]-[t].
2. At the Attachments List screen, click Insert and select Existing PDF File.
3. Browse for the file then double-click on the PDF or select a PDF and click Open.

   Keyboard shortcut: Select multiple files using [Ctrl]-click or [Shift]-click.
4. The Add Attachment screen:
   - Name: The default name is the filename and path of the PDF.
   - Attached To: Indicates what form the PDF file will be attached to.
   - Print order: Options include Before Form, After Form, Replaces Form and Do Not Print. The first three options determine where the attached PDF file is included in relation to the form.

     Tip: *When creating an attachment, the Replaces Form option rarely is used.*
   - PDF Filename: Provides the drive, path, and filename of the document. To select a different PDF click the ... button. To open the document in Adobe Acrobat click the view button. Click OK to add the PDF file to the document.
5. The Attachments screen lists the PDF that has been attached. Click Close to exit.
6. In the Forms and Schedules menu, a paperclip on the icon next to the document indicates there is an attachment.
7. When creating forms for filing using the ECF Wizard, the PDF Attachment will be included in the Petition.pdf


Add PDF Attachment
Attachment
Name:
C:\Documents and Settings\Desktop\CCC.pdf
Attached To:
Exhibit "D" to the Voluntary Petition
When does this document print?
Before Form
Replaces Form
Omit from Page Count
After Form
Do Not Print
Number of Pages: 0
PDF Filename:
C:\Documents and Settings\Desktop\CCC.pdf
View
The attached PDF file is NOT saved in your Best Case client file. It must remain in the original location and a copy will be inserted when you create a PDF file using the ECFiling button on the Print Documents window.
Did you fill in signature lines with /s/ (if required)?
OK
Cancel
Help

Add Attachment: Make any changes to the default options such as renaming the file.

Printing PDF Attachments

PDF attachments can not be printed directly from Best Case. A reminder prints stating there is a PDF attached to the form. After preparing files for electronic filing the attachment will be included in the Petition.pdf file. To print the attachment, open the ECF Manager and view the file in Adobe Reader. You can print the attachment directly from Adobe Reader.

Replace a Form with a PDF Attachment

Sometimes it is required to replace a standard version of a form with a new PDF attachment.

To create an attachment to replace a form:

1. Create an attachment using the steps outlined in Insert an Attachment above.
2. In Step 4: Choose the "Replaces Form" option from the Add Attachment screen.
3. In the Forms and Schedules menu, the word "Replaced" appears in brackets in front of the form name to indicate a new document.

Double-click on the file in the Forms and Schedules menu to open the Attachments screen.

IMPORTANT: A warning is posted at the top of the screen that states, "The normally generated document has been replaced by an attachment". This is a reminder that making any changes in the entry screen will not be reflected in the attachment, because the attachment has already been saved.

Tip: *This procedure is ideal for creating a 13 Plan from a word processing program.*

File an Amended Document Electronically

It's important to check with the local bankruptcy court to find out what the local rules are regarding filing amended Forms and Schedules.

Here are some local variations to take note of:

- **Amendment Cover Sheet:** Some courts require an amendment cover sheet for the amended document. An Amendment Cover Sheet is located in the Supplemental Forms folder.

  Note: *Some courts want the Cover Sheet to be contained in the PDF of the amended document, while others want two separate PDF documents. Check with your court to confirm.*

- **Amended Schedules and the Matrix:** Some courts require that all items from the original schedule be listed, while some require that only the new or changed items appear.
- **Creditor Address Matrix:** Some courts might want a new text file, while others might want a new PDF of the matrix as well.

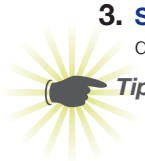
Here are a few tips for amending Forms and Schedules:

Mark Amended Check Boxes in Entry Screens: Click the Amended check box in the bottom left corner of the entry screen for each item you want to appear on the form.

Best Case technical support representatives are available to help with the creation of amended documents, however they cannot help with what needs to be filed. It's important to find out from your local court what the filing requirements are before contacting a Best Case technical representative.

Create a PDF for Quickforms: (Forms marked with a "Q" in the Forms and Schedules menu)

1. **Open the Form:** Double-click on the form and mark both options to print the date and /s/ name on signature lines. The form will open in the Best Case Editor.
2. **Insert Amended in form title:** In the Best Case Editor insert the word Amended in the form title.
3. **Save the Document:** Click File/Save. Choose to attach this document to a form in the Forms and Schedules Menu or select the default option—Replaces Form.



Tip: *If this is a motion to amend, you may want to attach it to the amending document so it can be easily found in the future.*

Click Save to Case. Then click the ECF button to use the ECF Wizard to create a PDF of this and any other forms for submission.

Upload Files: Open the ECF Manager. Use the ECF Express to help upload amended files.

Electronic Filing FAQs

1. Q: How do I change the order of the forms?
A. If the court requires that documents be submitted in a different order than the order in the Forms and Schedules menu, reorder the forms before creating electronic files. From the Forms and Schedules menu, press [Ctrl]-[Shift]-[J] to open the Jurisdiction screen. Click Edit Forms List to edit the jurisdiction settings. Highlight the form, then click either the Up or Down option to move the form to the desired location.

2. Q: If I need an ECF login and password, how do I get one?
A: Contact your local bankruptcy court to register for an ECF training session. Attendees are issued an ECF login and password after completion of the course. The course covers topics including how to create PDF files using Adobe, how to navigate though the court's CM/ECF web site, and more.

3. Q: How does Best Case handle electronic signatures?
A: Best Case automatically inserts "/s/ <name>" on signature lines, as well as the date, when electronic files are created. Most courts accept "/s/ <name>" on a signature line to represent the signature of an attorney or debtor in the PDF file.

4. Q: How do I create the Creditor Address Matrix text file?
A: Best Case simultaneously creates a text file of the creditors along with the other electronic files. It is formatted per the Court's requirements. The Best Case OneTouch electronic filing system will automatically upload the matrix as part of your initial filing.

5. Q: How do I file an Amended Creditor Address Matrix?
A: The ECF Express feature assists in filing an Amended Creditor Address Matrix. Some courts require a two-step process to docket the amended matrix: (1) Upload a single PDF file of the amended matrix under the Miscellaneous or Other section of the CM/ECF Bankruptcy Events menu; and (2) Upload a text file of the amended matrix in the Creditor Maintenance section of the CM/ECF Bankruptcy Events menu. Check with the court's ECF Help Desk to confirm the district's amended matrix filing procedures.

6. Q: My ECF login failed and the computer says to verify my login/password. What should I do?
A: There are different logins for live ECF sites, training ECF sites, and PACER. First, make sure you're using the correct login and password. Check for typing errors and verify that the login page is correct. Remember that the login/password is case sensitive. If you are still unable to login, please call the court's ECF Help Desk to verify your login information.

7. Q: What should I do if I receive the following message, "Unable to connect to the court for 1 minute"?
A: This is a time out error and means Best Case has waited one minute to connect to the court's web site. Check the court's ECF page and the court's home page to see if there are any reported problems with CM/ECF. Then, try filing the case again. If you receive the same time out message on your second try, then you may need to disable a firewall within your office to determine if the firewall is blocking the OneTouch® electronic filing system.

Tip: *To disable Norton AntiVirus™, right-click on the globe icon in the lower right corner of the screen and select Disable. Try filing the case with OneTouch again. If you are able to successfully file the case after disabling the fire wall, then you should re-enable the firewall and disable it each time you file a case. Alternatively, your firm's computer specialist can configure Norton AntiVirus™ to permanently allow the OneTouch System access to your firm's firewall. If your firm installed a firewall other than Norton, please consult the user's manual that came with that particular program for instructions on how to disable the firewall.*

8. Q: What if I discover I made an error on a document I already filed?
A: The Best Case technical support specialists can assist in creating corrected documents. But it's always a good idea to confirm with the court the requirements for the amended filing and where it needs to be uploaded to on the court's ECF web site. To contact the Best Case technical support team call 1.800.492.8037.

Best Case Commitment:
Your satisfaction is our top priority. To continually provide the best quality product and service, we are constantly speaking to users like you to get your feedback. Please e-mail your suggestions and comments to help@bestcase.com. We look forward to hearing from you!

Quick Start Guide:

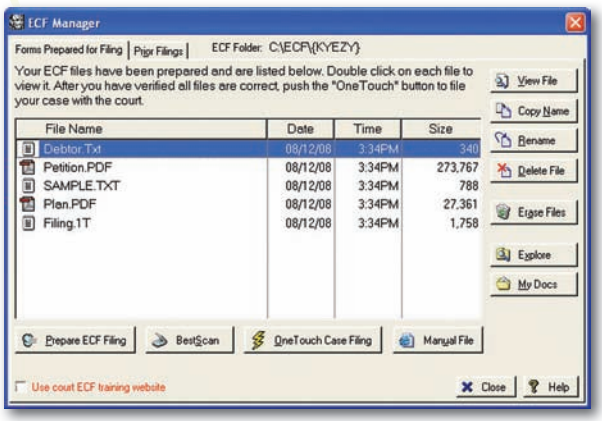
Create electronic files and send them to your Court's web site in a few easy steps.

How to File a New Case: Getting a Case Number

1. ECF Wizard: Create Electronic Files

- Open the Forms and Schedules menu and click the ECF lightning bolt in the toolbar to open the ECF Wizard.
- Choose between a Complete or Skeletal petition.
- Follow the on-screen prompts.
- On the last screen click Prepare Filing to create forms.

Tip: *Chapter 13 Plans: Before beginning, decide if the Plan is going to be filed now.*



2. OneTouch®: Transmit Files to the Court*

- The ECF Manager opens and displays the electronic files.
- Click OneTouch Case Filing and enter your log-in and password.
- Click File Case to upload files—the necessary ECF documents are submitted to the Court's web site.
- The Court will transmit your case number and a filing confirmation.

* Best Case Web Services are required to use OneTouch. This service is included in the Maintenance Plan. If your Maintenance has lapsed use the Manual Filing option to upload cases. To renew your Plan today call 1.800.492.8037.

3. Pay Now Express™: Pay Filing Fees

- Click Pay Fees from the ECF Manager screen.
- Click Login Now.
- Pay Now Express selects Internet Payments Due, which directs you to the U.S. Courts' Payment Collections web site.
- Click Pay Now to submit the payment.

Note: *The Pay Now feature is only available in CM/ECF districts where the Court offers online credit card payments.*

4. Assign Judge and Trustee

- Close the ECF Manager after you receive the case number.
- Re-open the ECF Manager.
- Click ECF Express to log-in.
- In the Bankruptcy Events Menu click the J/T button to assign the judge and trustee.
- Print the receipt.

Note: *The Judge and Trustee feature is only available in CM/ECF districts where the Court offers online judge/trustee assignment.*

How to File Documents with a Case Number

Note: *The assigned case number is displayed in the Voluntary Petition.*

1. ECF Wizard: Create Post-Petition Files

- Click the ECF lightning bolt to open the ECF Wizard.
- Select the post-petition documents to file. Choose from:
  - Chapter 13 Plan (first or amended)
  - Amendments
  - Motion or supplemental forms
  - Emergency completion (balance of forms and schedules)
- Select the forms to include in the filing.

Tip: *An easy-to-use checklist is provided for selecting specific forms for filing.*

- Filing Amendments: Choose a print option from the on-screen prompt.
- Click Prepare Filing to prepare PDF documents.

Tip: *Make a note of the name of the PDF file for easy reference.*

2. Transmit Files to the Court

- The ECF Manager opens and displays the electronic files.
- Click ECF Express.

Note: *Unlike OneTouch, you will have to make the decisions about what actions to perform.*

- Click the links on the Court's web site to proceed with filing.
- ECF logs into the Court's web site and enters the case number when prompted and selects the parties.
- Click Browse to upload the PDF file—ECF Express will display the files created.

BEST CASE SOLUTIONS

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